



Evaluation Report Checklist

A. The following are required content for an evaluation to be considered complete:

1. ___ Identifying participant information
2. ___ List of collateral information sources: Must include 3 collateral sources to include UPHP
3. ___ Presenting problem and reason for referral
4. ___ Substance use/tx history, frequency and patterns of use, types of drugs or alcohol used
5. ___ Psychosocial history narrative (psychiatric, family and social history)
6. ___ Medical history, including current medications, reasons for use, dosage and frequencies
7. ___ Legal History
8. ___ Laboratory Data: toxicology testing summarized- most recent blood/hair/urine drug screen
9. ___ Dynamic Formulation using ASAM dimensions
10. ___ DSM-5 diagnostic summary: Must explain criteria met and justify diagnosis
11. ___ Safety to practice statement
12. ___ Treatment recommendations to include ASAM level of care (Do not recommend tx facility)
13. ___ Incorporate statement in narrative regarding all documents received from UPHP/DOPL

B. Returning evaluations to UPHP:

1. ___ Within 1 business day please send the initial evaluation form to UPHP/DOPL
2. ___ Return final report within 10 business days
3. ___ Notify UPHP of any circumstances that may cause delay

C. Other helpful information:

Once your report has been sent to UPHP:

- If you change your opinion after your report has been sent to UPHP (secondary to new information) you must put it in writing as an addendum
- While you may discuss your recommendations (level of care only) with evaluatee, you must also inform them that the recommendation may change following UPHP review. UPHP reviews all reports. UPHP reviews reports in clinical team meetings twice per week. We may request additional information or request reconciliation after reviewing report
 - Evaluatee should call UPHP if they have concerns about recommendations. We will inform then they are entitled to a second opinion by another approved evaluator
 - In most instances, the individual is entitled to a copy of their evaluation and will need it to provide to treatment provider, but it is recommended they sign a release of information at time of evaluation

*Note: If any of these elements are not attainable or the evaluation does not occur as scheduled, please contact UPHP program manager as soon as possible. Kellijacobsen@utah.gov

